



Financial Officer Welcome Guide

The PCORI Finance team is here to help with all your invoice-related needs and questions. This page includes information for the financial officer on creating a PCORI Online account, submitting invoices, invoicing frequency, common reasons for invoice rejection, and where to turn for additional support. We look forward to assisting you throughout the course of this award and in the future.

Creating a PCORI Online Account for Invoice Submission

All research and engagement award invoices **must** be submitted through the PCORI Online system.

- Create a PCORI Online account at the website below by clicking **New User?** and following the prompts. You can access PCORI Online by visiting <https://pcori.force.com/engagement>
- After registering, a user does not automatically have access to projects. The administrative official, principal investigator, or project director must email pfa@pcori.org to request project-level access for the financial officer using the [Authorized User Request Form](#).
- If you need help creating an account or accessing a project, we recommend:
 - Visiting the **Awardee Resources** page at <https://www.pcori.org/funding-opportunities/awardee-resources> to access training materials and user manuals
 - Emailing the technical helpdesk at help@pcori.org

Submitting Invoices

To submit an invoice for payment by PCORI, the financial officer must do the following:

- Fill in the requested information for each field within PCORI Online.
- Upload a physical invoice and labor detail (if required) per the contract terms and conditions.
- If invoicing for a **cost-reimbursable** contract, a PCORI Invoice Template is available. However, awardees are not required to use the PCORI Invoice Template as long as each invoice submitted contains all of the required information stated in the contract.
 - Visit the Awardee Resources page at www.pcori.org, email invoice@pcori.org, or call us at 202-370-9315 to request the [PCORI Invoice Template](#).
- If invoicing for a **firm-fixed-price** contract, there is no PCORI Invoice Template; however, the invoice should:
 - Be placed on your institution's letterhead.
 - Reference the PCORI contract number.
 - Contain the name of the principal investigator or project director.
 - Indicate the milestone being billed and the amount requested for payment as outlined in the contract.

Invoice frequency

- For **cost-reimbursable** contracts, invoices should be submitted every 30-90 days depending on your cash-flow needs.
 - A \$0 invoice should be submitted if no costs have been incurred during a billing period.
- For **firm-fixed-price** contracts, invoices should be submitted within 30 days of completing the associated milestone or deliverable.

PCORI Payment

- PCORI issues payment within 30 days of receipt of an allowable and compliant invoice.
- The financial officer will receive a notification by email if an invoice cannot be processed or requires corrections.
- The financial officer can track the status of the invoice approval and payment within PCORI Online.
- PCORI transfers funds via the Automated Clearing House through Bill.com.
- PCORI Finance staff will work with the financial officer to obtain bank information for payment.

Common Reasons for Invoice Rejection

- Labor detail is not provided, if required per the contract.
- Milestone payments do not match the contract for firm-fixed-price contracts.
- Invoicing more than 90 days before the contract start date or after defined milestone dates outlined in the contract milestone schedule.
- Exceeding travel and personnel budget caps by more than 25 percent without obtaining written prior approval, if required per the contract.
- Accounting discrepancies in the *cumulative expense to date*.

Additional Resources

Email invoice@pcori.org for non-technical invoice-related questions or call us at 202-370-9315.

Email help@pcori.org for technical support.

Email fundedpfa@pcori.org for contract questions.

Refer to the User Guide on Submitting Invoices through PCORI Online:

<http://www.pcori.org/sites/default/files/PCORI-Online-Submitting-Invoices-User-Guide.pdf>

Watch a recording of a training session in the Awardee Resources page:

<http://www.pcori.org/funding-opportunities/awardee-resources>